



# GERMANY MEDIA LANDSCAPE

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# **COUNTRY OVERVIEW**

# Country Overview

THE SERVICE SECTOR CONTRIBUTES AROUND 70% OF THE TOTAL GDP



CAPITAL  
**Berlin**

REGION  
**Europe**

GDP PER CAPITA, PPP  
**\$57,530**

GDP  
**\$3.86 trillion**

POPULATION  
**83,132,799**

AREA  
**357,022 SQ.KM**

The land that gave birth to the modern printing press, Ludwig van Beethoven and Immanuel Kant has strong traditions in literature, music and philosophy.

Germany possesses a highly skilled, affluent workforce. The country's population is aging, however, raising questions about the high level of spending for social services.

Services, which include industries such as telecommunications, health care and tourism, contribute the greatest amount to the country's economy. Industry and agriculture are other significant economic sectors.



A black and white photograph of a woman walking through a modern airport terminal. She is carrying a rolling suitcase and a backpack, and is looking down at a smartphone in her hand. The terminal has large glass windows and a polished floor that reflects the light. A red banner with white text is overlaid on the image.

# OUTBOUND TRAVEL INSIGHTS

# Outbound Tourism Overview

## TRAVEL PATTERNS AND PREFERENCES (2019)

### TRIP DURATION

9-11 days

### BOOKING LEAD TIME

56% book between 2 -6 months l  
advance (medium 3-4 months)

### DESTINATION TIME

Propensity to visit architecture and  
sun & beach destinations

### KEY TRAVEL TIME

J	F	M	A	M	J	J	A	S	O	N	D



Total outbound expenditure is  
expected to stand at US\$191.9  
billion by 2022



Spain is their most visited  
destination



Visiting monuments and  
Gastronomy- top activities when  
traveling

- UAE is the 4th most visited long-haul destination.
- Germany ranked 8<sup>th</sup> in the top source markets for Dubai in 2019.
- Average duration of travel to the UAE: 13.1 days
- 560,000 tourists visited the UAE in 2018.
- Their liking for beach destinations and a preference for security brings them to Dubai

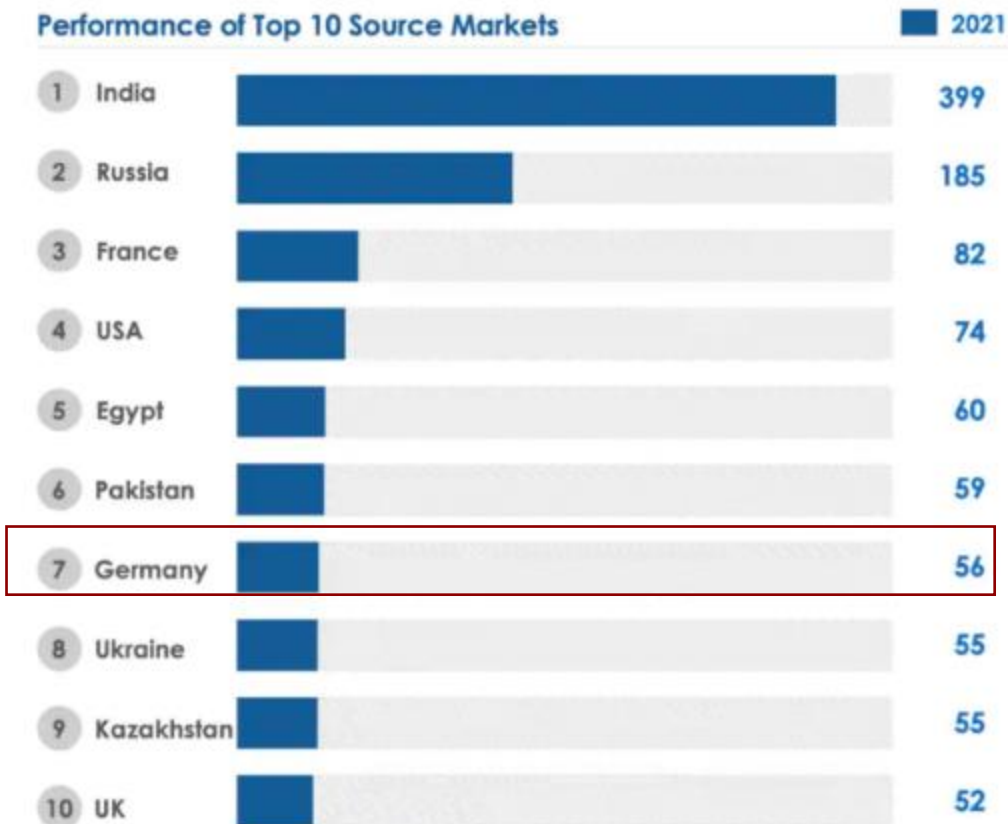


Germans are the third highest-spending tourists globally.

# Outbound Tourism Overview

GERMANY IS THE 7<sup>TH</sup> LARGEST SOURCE MARKET FOR DUBAI (JAN-MAY 2021)

## Top 10 Source Markets For Visitors To Dubai ('000 Visitors Jan - May 2021) | Performance Of Top 10 Source Markets



Source: [DTCM](#)

## Leading Factors Influencing Travel Decisions

### Destinations

Health regulations & requirements  
(mandatory mask rules, etc.)



68%

Europe

### Costs



67%

Europe

### Transportation

Use of masks is enforced



48%

Europe

Easy refunds/cancellation policy



46%

Europe

### Accommodations

Proper COVID-19 hygiene protocols



53%

Europe

### Costs



45%

Europe

Source: [Expedia](#)



# MEDIA LANDSCAPE

**MEDIA**

**RADIO**

**MAGAZINES**

**INTERNET**

**TELEVISION**

**NEWSPAPERS**





# Media Consumption Overview

99% OF PEOPLE IN GERMANY USE THE MASS MEDIA EVERY DAY

Germans spend  
More than 10 hours  
consuming media every  
day, with traditional  
media still consumed  
significantly more than  
digital.



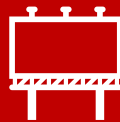
**3H 33M**

Average daily TV viewing (Broadcast, Streaming & VOD)



**4H 52M**

Daily internet consumption



**58%**

of Germans have perceived an OOH site at least once a week



**4H 00M**

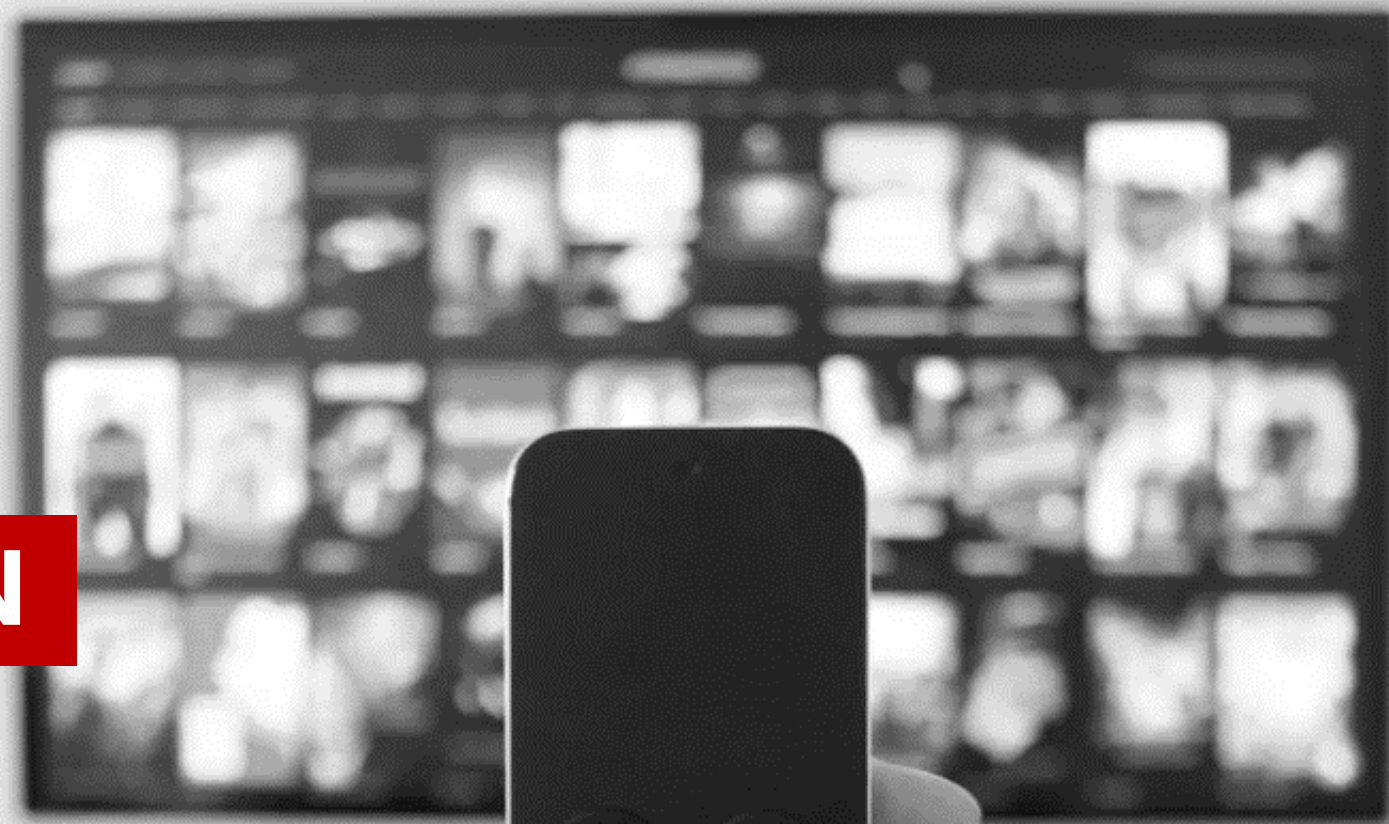
Their consumption of radio is very high



**84.6%**

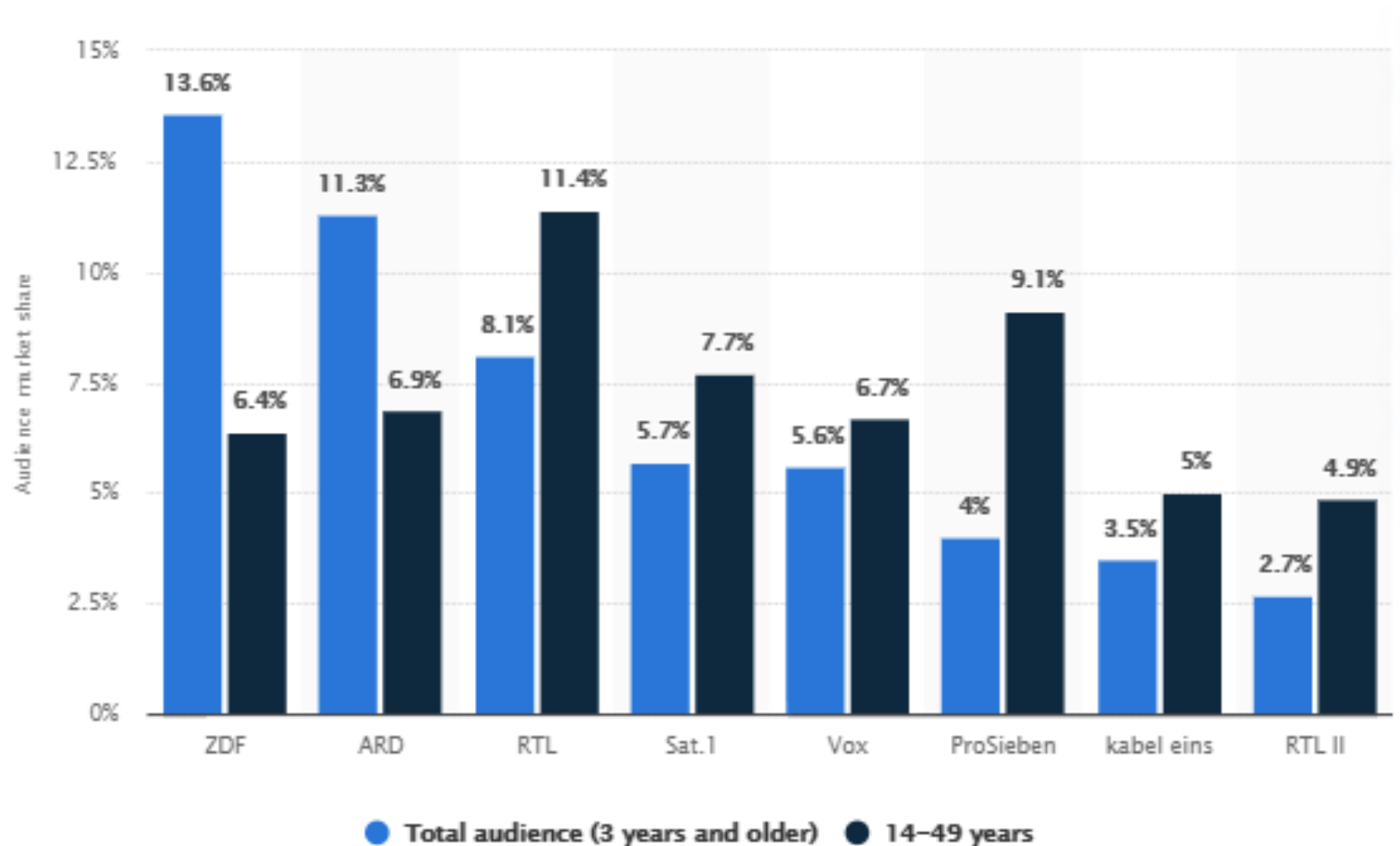
of the population read printed and digital newspaper

**TELEVISION**



# Television

## TOP TV STATIONS (2020)



**Audience market share of top television stations in Germany in 2020**

# Television

TV IS THE MOST CONSUMED TRADITIONAL MEDIA IN GERMANY

NUMBER OF TV HOUSEHOLDS IN GERMANY

38.5m

AVERAGE DAILY TV VIEWING TIME IN GERMANY

220min

MOST POPULAR TV GENRE IN GERMANY

News

In 2020, 72% of the German population watched TV.

Streaming services account for 14% of the daily time spent watching content among 14-25 years old, and 6% both in total and for the group aged 26-35.

Linear TV accounts for 73% of daily time spent watching video in Germany, but this figure drops to 53% among 14-25 year-olds.



# Television – Impact of COVID-19

VIDEO STREAMING HAS CHANGED THE VIDEO CONSUMPTION LANDSCAPE IN GERMANY

SHARE OF PAY VOD USERS IN GERMANY

44%

NUMBER OF ACTIVE SVOD USERS IN GERMANY

6.2m

NETFLIX AWARENESS IN GERMANY

85%

There are 6.2 Million SVOD users in Germany as of May 2021, hitting a record high.

As many as 73% of SVOD households already subscribe to two or more streaming services.

Netflix, Amazon Prime and Disney+, as well as local operations, including RTL's TVNow and ProSiebenSat.1's Joyn — have driven explosive growth in the VOD market.



**DIGITAL**

# Digital

THE COUNTRY HAS 78 MILLION ACTIVE INTERNET USERS



# Digital

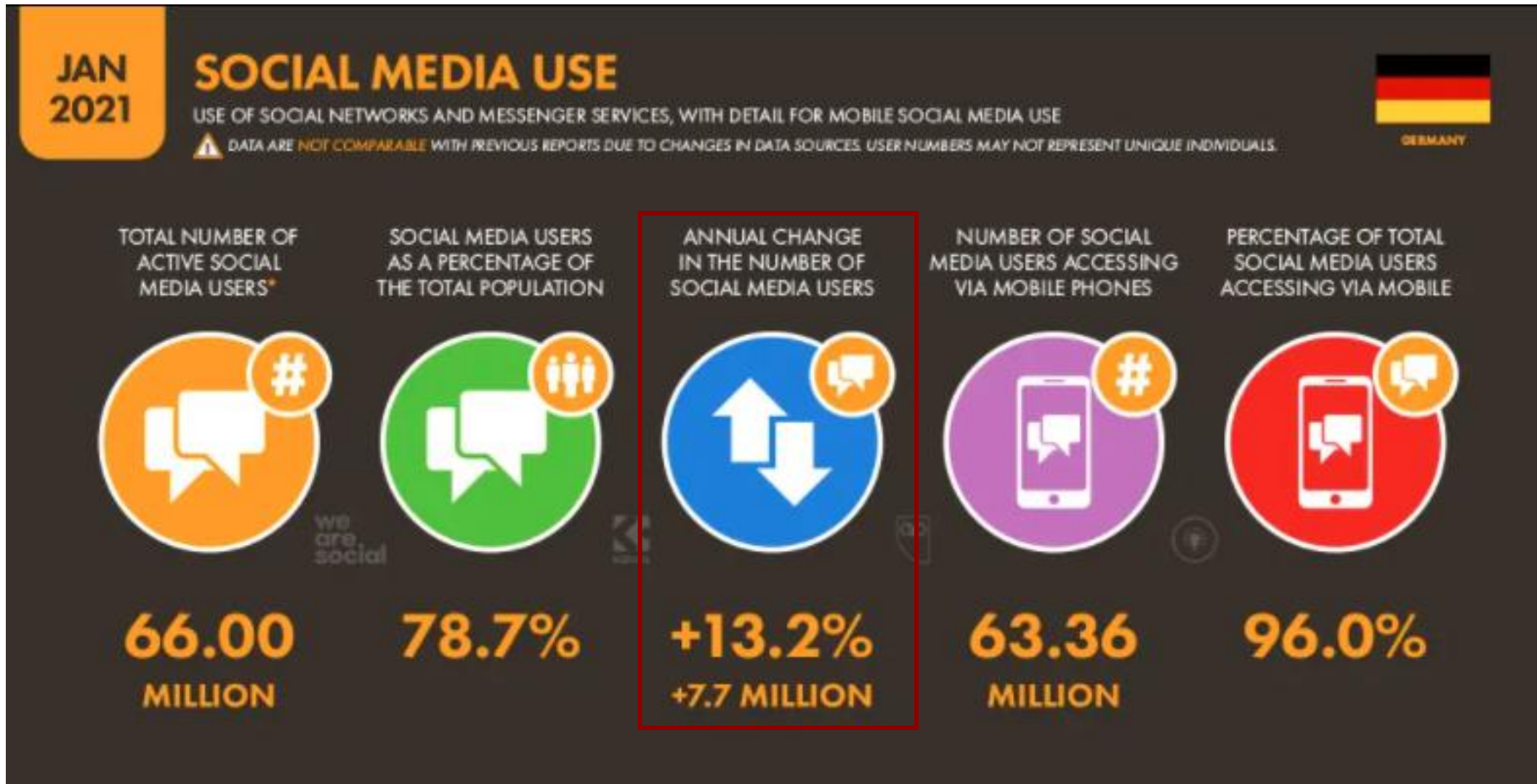
LARGE SHARE OF ONLINE TIME IS SPENT ON YOUTUBE





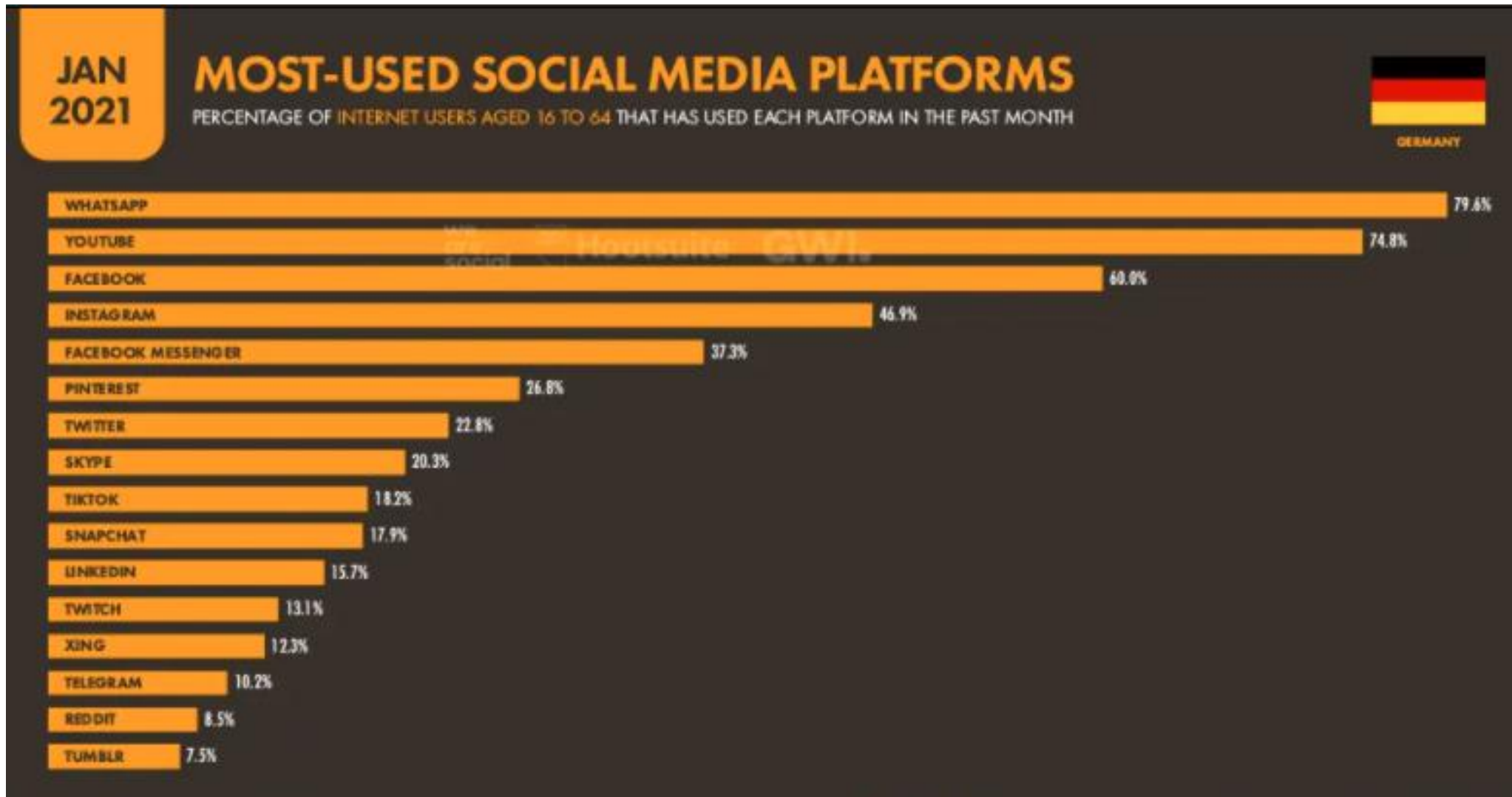
# Digital

SOCIAL MEDIA USERS INCREASED BY 7.7 MILLION BETWEEN 2020 AND 2021



# Digital

FACEBOOK AND INSTAGRAM ARE THE MOST USED SOCIAL NETWORKING SITES



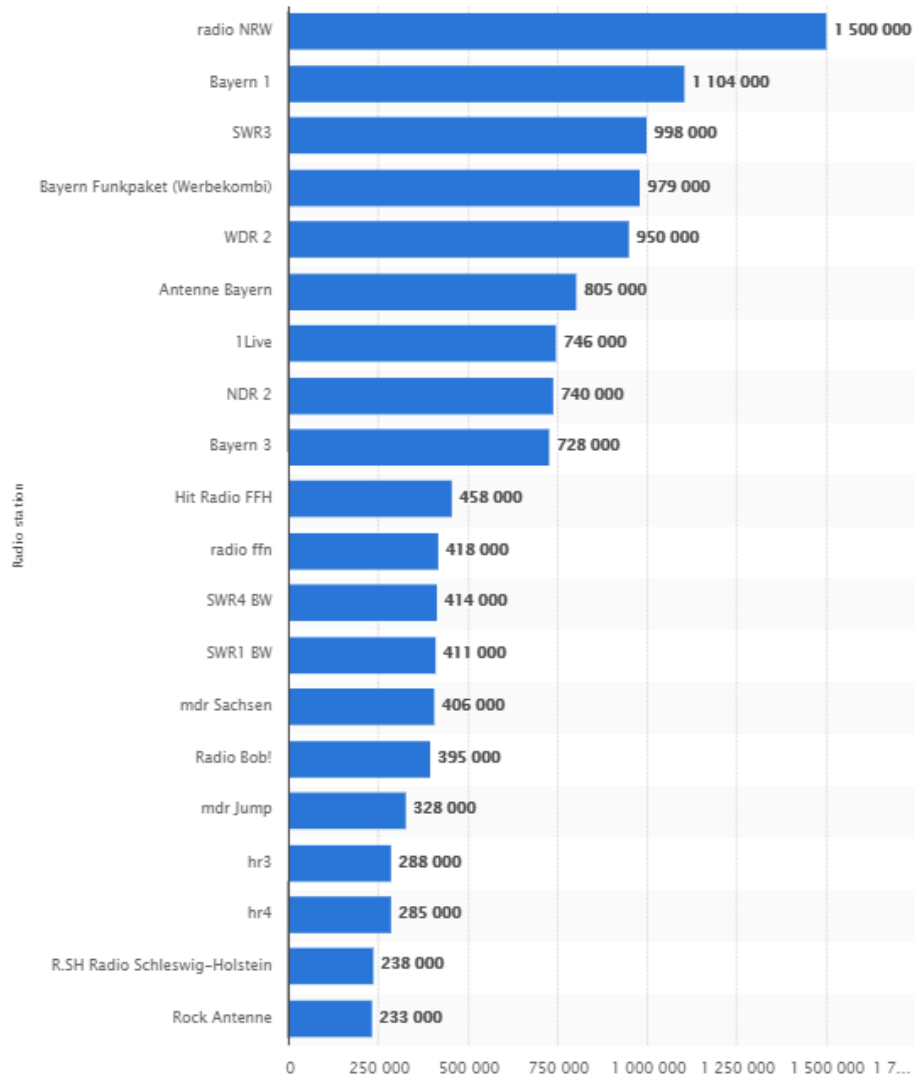
**RADIO**





# Radio

## WEB RADIO AUDIENCE ON THE RISE DUE TO COVID-19



### Leading radio stations in Germany 2020



Radio is a popular mass medium that accompanies the public throughout the day.

About 80% of those above the age of 14 regularly listen to the radio.

In 2016, at least 46% of Germans declared that they use the radio as primary source to access news.

Germany sees 22% web radio audience growth since start of COVID-19 crisis.



A black and white photograph of a stack of newspapers and books on a wooden surface. The top newspaper is partially unfolded, showing text about Italy's economy and the Italian tycoon Mr. Berlusconi. Below it is a book with a white cover and a black spine, titled 'Brand New Nonly'. The book is lying flat, and its pages are visible. The stack is resting on a dark, textured wooden surface. A red rectangular box with the word 'PRINT' in white capital letters is overlaid on the left side of the image.

**PRINT**

A vast stock market... Italy's government... urgent measures to balance its country's budget, as plunging stock markets signalled that confidence in European leaders was at a new low.

The billionaire Mr. Berlusconi, who boasted earlier yesterday that markets trust him because he is a "tycoon", told reporters summoned to his official resi-

dentism... Reconstruction... told The Times that the crisis was "knockknapping all the tremendous growth made in Eastern Europe over the past ten years".

The week has drawn comparisons with late 2008, when Lehman Brothers...

...in this week's... stepped in yesterday to try to calm the markets, which have been spooked by fears of a disorderly euro break-up.

"The market unrest witnessed in the last few days is simply not justified on the basis of the current situation."

...to the book itself and its... will increase... onset of digital... if readers are... on buying... will want them

PICTURES  
BOOKS

Brand  
New  
Nonly

STORIES  
MOSTLY

A HANDFUL

# Print

NEWSPAPERS ARE NOT MANAGED BY THE STATE, BUT RUN BY PRIVATE MEDIA COMPANIES

## Most Read Daily German Newspaper 2019

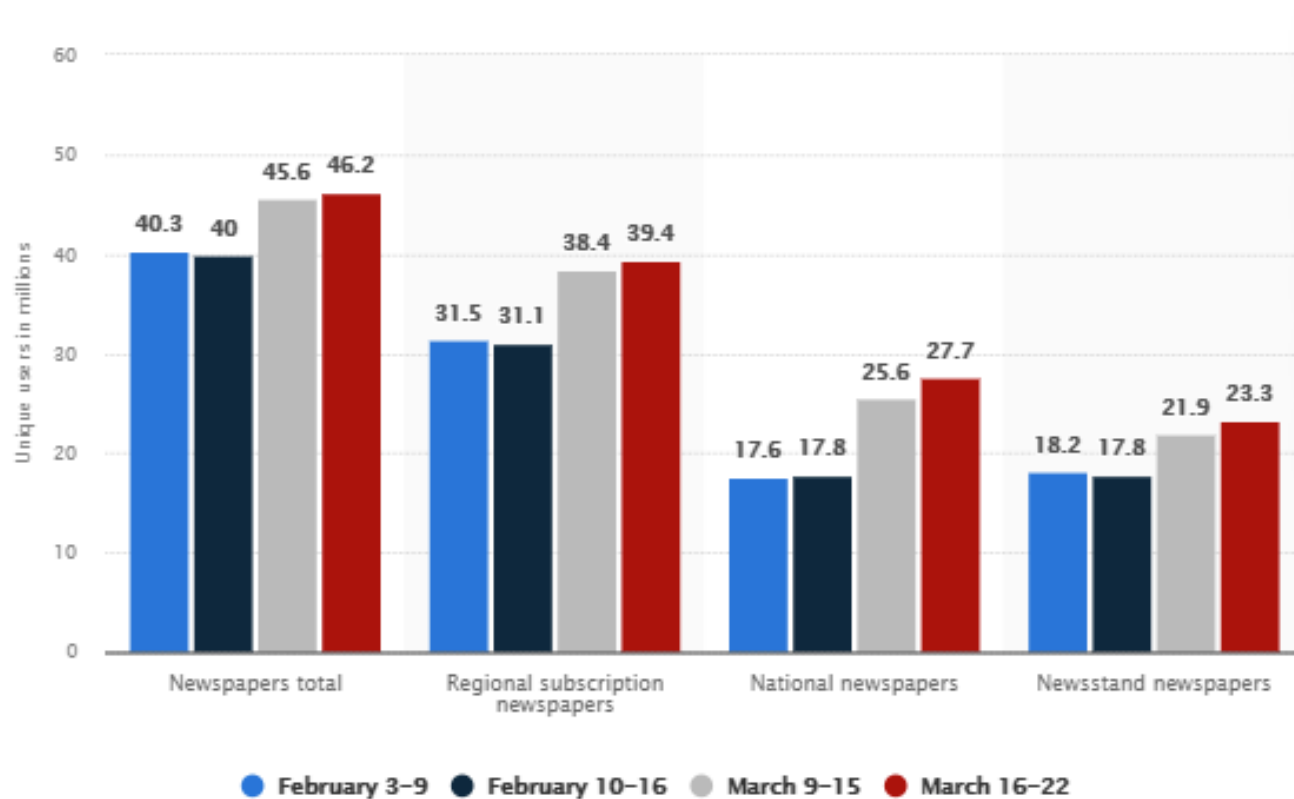


- Germany has the fifth largest newspaper market in the world, after China, India, Japan and the USA
- There are around 323 daily newspapers, 23 weekly newspapers and six Sunday newspapers circulated in Germany. In addition, there are also 1,626 popular magazines and a growing range of specialist publications with a current total of 5,600 titles
- Newspapers – in printed and digital form – reach three quarters of the German-speaking population every day

# Print - Impact of COVID-19

## RISE OF DIGITAL NEWSPAPER DURING COVID-19

**Number of unique users of digital newspapers during the coronavirus (COVID-19) epidemic in Germany in spring 2020, by segment**



- As of March 2020, national digital newspapers have recorded 27.7 million unique users. This was an increase compared to the 25.6 million registered a week before
- One in two Internet users in Germany regularly use the online services offered by newspaper and magazine publishers



**OUT OF HOME**





# OOH

## TOP OOH COMPANIES



Ströer SE & Co. KGaA is a German out-of-home advertising, online advertising, billboards and street furniture company with headquarters in Cologne.



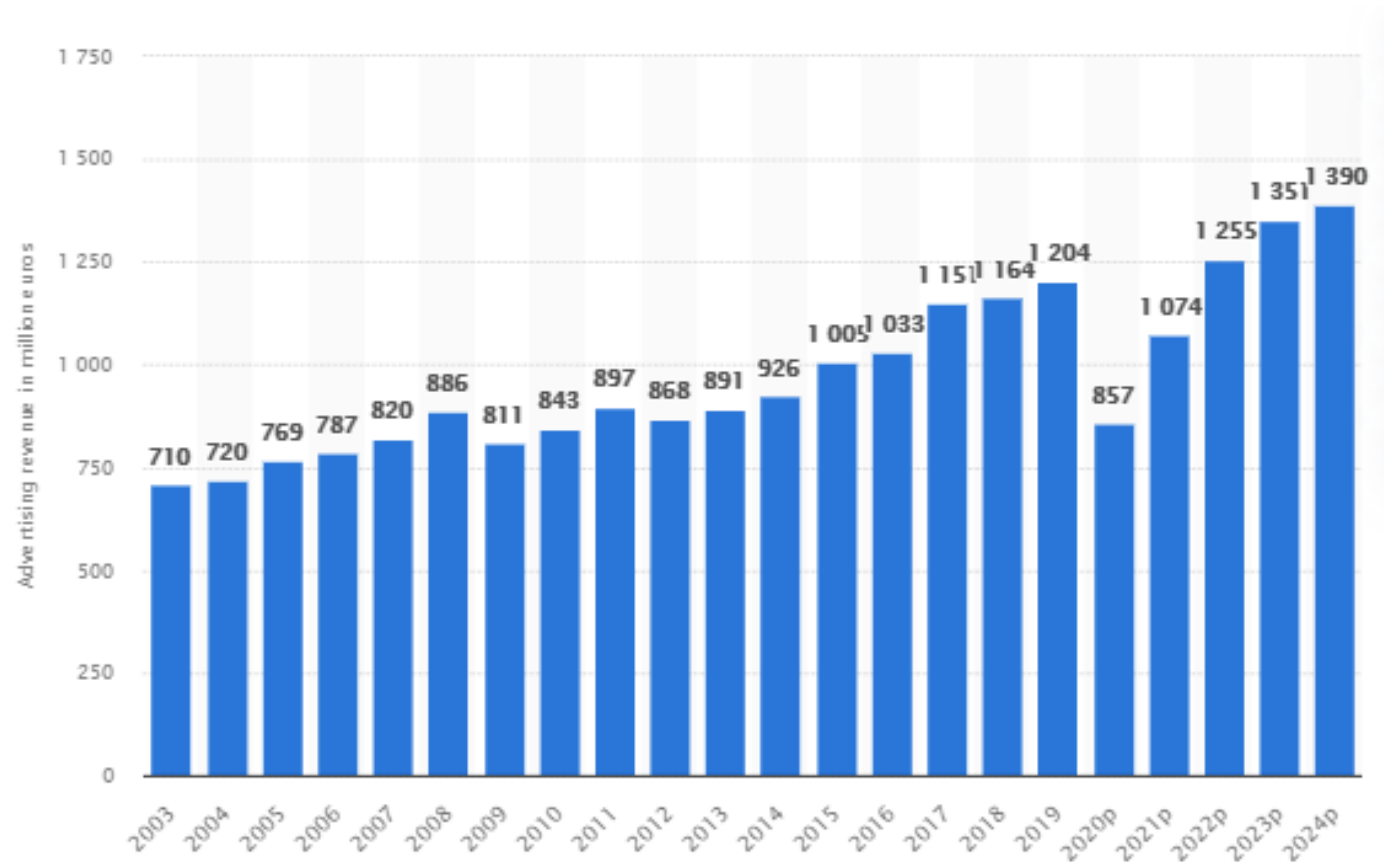
The Wall GmbH is a German company based in Berlin, which specializes in outdoor advertising and street furniture. It is present in Germany and Turkey. The company has been part of the JCDecaux group since 2009.



Awk Aussenwerbung outdoor advertising is one of the major providers of outdoor advertising. The company has around 56,000 advertising media in its portfolio.



**Outdoor advertising revenue in Germany from 2003 to 2024\***  
(in million euros)







**KEY UPCOMING OPPORTUNITIES**

# Key Upcoming Opportunities

GERMANY REOPENED ITS BORDERS TO TOURISTS ON 25<sup>TH</sup> JUNE 2021

- New Year's Day (Neujahr): January 1, 2021
- Three Kings Day (Heilige Drei Könige): January 6, 2021
- Carnival (Karneval): February 16, 2021
- Good Friday (Karfreitag): April 2, 2021
- Easter Monday (Ostermontag): April 5, 2021
- Labour Day (Tag der Arbeit): May 01, 2021
- Mother's Day (Muttertag): May 9, 2021
- Ascension Day (Christi Himmelfahrt): May 13, 2021
- Whit Monday (Pfingstmontag): May 24, 2021
- Corpus Christi (Fronleichnam): June 3, 2021
- Assumption Day (Mariä Himmelfahrt): August 15, 2021
- Oktoberfest: from September 18, 2021, to October 3, 2021
- German Unity Day (Tag der deutschen Einheit): October 03, 2021
- Day of Reformation (Reformationstag): October 31, 2021
- All Saints' Day (Allerheiligen): November 01, 2021
- Christmas Day (Weihnachtstag): December 25, 2021



# APPENDIX

## MEDIA TITLES



**PRINT/ONLINE**



## KEY MEDIA- NEWSPAPER

### Bild

**Circulation:** 1,182,699

**Language:** German

**Total web visits:** 212.02M

**Average visit duration:** 00:04:29

Bild is a German daily tabloid newspaper published by Axel Springer SE. It provides its readers with the mix of news, gossip, crime stories and sensationalism. It is the best-selling European newspaper and has the sixteenth-largest circulation worldwide being popular with German readers.



### Die Zeit

**Circulation:** 574,492

**Language:** German

**Total web visits:** 42.51M

**Average visit duration:** 00:03:57

Die Zeit is a German national weekly newspaper published in Hamburg in Germany. As a weekly newspaper, it views social events in a more extensive manner cultivating analysis and providing a balance between political camps compared to a daily newspaper. The newspaper has a reputation for bringing quality to its readers. Breaking news as well as general interest features are published.





## KEY MEDIA- NEWSPAPER

### Süddeutsche Zeitung

**Circulation:** 279,079

**Language:** German

**Total web visits:** 33.15M

**Average visit duration:** 00:02:29 min

The Süddeutsche Zeitung (SZ), published in Munich, Bavaria, is one of the largest daily newspapers in Germany. The national edition features four sections: Politics, Culture, Economy and Sports. Editions sold in Munich and its surrounding counties include local news inserts. SZ has won a number of prestigious awards for its investigative journalism.

### Frankfurter Allgemeine Zeitung

**Circulation:** 192,770

**Language:** German

**Total web visits:** 39.36M

**Average visit duration:** 00:02:16

The Frankfurter Allgemeine (FAZ) is a daily German newspaper founded in 1949. It provides its readers with the most current news on politics, finance, sports, technology, travel and more. It stands for its independence, quality journalism, exclusive news and well-founded analysis.





# KEY MEDIA- NEWSPAPER

## Handelsblatt

**Circulation:** 87,560

**Language:** German

**Total web visits:** 10.98M

**Average visit duration:** 00:01:47

The Handelsblatt is a German-language daily business newspaper published in Düsseldorf by Verlagsgruppe Handelsblatt. With around 40 correspondents abroad, the Handelsblatt is on site in all business centers around the world. An English-language digital edition was launched in 2014, called Handelsblatt Global Edition, which aims to reach an international audience interested in German business and finance news.



## Die Welt

**Circulation:** 66,957

**Language:** German

**Total web visits:** 67.10M

**Average visit duration:** 00:03:31

Die Welt is a German national daily newspaper, published as a broadsheet by Axel Springer SE. In 2015, the editorial offices of Die Welt and the TV station N24 were merged to produce multimedia news. Since then, their motto has been "online first", meaning that all articles are published on the website immediately.



# KEY MEDIA- NEWSPAPER

## Die Tageszeitung

**Circulation:** 42,113

**Language:** German

**Total web visits:** 11.49M

**Average visit duration:** 00:01:21

Die Tageszeitung (taz), is a cooperative-owned German daily newspaper administrated by its employees. It focuses on current politics, social issues such as inequality, ecological crises both local and international, and other topics not covered by the more traditional and conservative newspapers.

## Neues Deutschland

**Circulation:** 19,010

**Language:** German

**Total web visits:** Not publicly available

**Average visit duration:** Not publicly available

Neues Deutschland (ND) is a German daily newspaper, currently headquartered in Berlin. ND is oriented towards a socialist viewpoint and is owned partially by The Left party. The goal is to give those in eastern Germany a voice and to represent the democratic socialist viewpoint. Other traditional sections of a newspaper are also included, such as an advice page, a television guide, classifieds, opinion columns, and theme sections dealing with health, environment, and other issues.



# Television



## KEY MEDIA - TV

### ZDF

**Share of total viewing:** 13.6%



ZDF (Zweites Deutsches Fernsehen) is Germany's national public television broadcaster. It offers full-range generalist programming with a mix of information, education, arts, entertainment and sports. Its coverage provides both a broad view on the world and a comprehensive picture of Germany.



### Das Erste

**Share of total viewing:** 11.3%



Das Erste is the flagship national television channel of the ARD association of public broadcasting corporations in Germany. It is a General Entertainment TV channel popular for its soap operas and crime series.



### RTL

**Share of total viewing:** 8.1%



RTL is a German free-to-air television channel owned by the RTL Group and is the largest private network in Germany. The network broadcasts shows that include American hits as well as original programming, made-for-TV movies, sports, news, and more.





## KEY MEDIA - TV

### RTL 2

**Share of total viewing:** 3.0%



RTL Zwei, also known as RTL 2 is a German-language television channel that is operated by RTL2 Television GmbH & Co. KG. It broadcasts documentaries, reports, docu-soaps, TV series and films.

### VOX

**Share of total viewing:** 4.6%



VOX or Vox is a German television channel, headquartered in Cologne and part of the RTL Group, Europe's second largest TV, radio, and production company. The channel mainly broadcasts documentaries and U.S. series and movies.

### SAT.1

**Share of total viewing:** 5.6%



Sat.1 is a German free-to-air television channel that is a part of the ProSiebenSat.1 Media Group. The channel broadcasts news, entertainment, lifestyle, sports, movies, series and reality-shows programming.



## KEY MEDIA - TV

### ProSieben

**Share of total viewing:** 4.0%



ProSieben is a German free-to-air television network owned by ProSiebenSat.1 Media. It is Germany's second-largest privately owned television company. Although ProSieben produces some of its programming itself, it also airs many American imports.

### Kabel Eins

**Share of total viewing:** 3.5%



Kabel Eins, is a German free-to-air television channel that was launched on 29 February 1992. It is owned by ProSiebenSat.1 Media AG. It is largely known for airing classic American films as well as TV series and documentaries. It is a sister channel of ProSieben.



**RADIO**



## KEY MEDIA

### Bayern 1

**Frequency:** 91.3 MHz (München-Ismaning)

**Language:** German

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Bayern 1 is a German, public radio station owned and operated by the Bayerischer Rundfunk (BR). Musically, the station relies on golden hits and melodic pop.



### SWR3

**Frequency:** 98.2 MHz (Diez)

**Language:** German

---

SWR3, a part of Sudwestrundfunk (SWR) group started broadcasting on August 30, 1998. SWR3 plays the best pop songs, radio comics and live concerts around the clock to a target audience of 14-39-year-olds.



### WDR2

**Frequency:** 102.1 MHz (Olsberg)

**Language:** German

---

WDR 2 is a radio network owned and operated by the Westdeutscher Rundfunk (WDR) public broadcasting organization in Germany. It focuses on contemporary pop and rock music for an adult audience.





## KEY MEDIA

### Antenne Bayern

**Frequency:** 107.5 MHz (Munich)

**Language:** German & English

Antenne Bayern is a private radio broadcaster in Bavaria based in Ismaning. It broadcasts both German and international music covering hits, pop, rock and many more genres.



### 1LIVE

**Frequency:** 107 MHz (Olsberg)

**Language:** German

1LIVE is a radio network by the Westdeutscher Rundfunk public broadcasting corporation in Germany. It broadcasts popular music aimed at the 14–39 age demographic.



### NDR 2

**Frequency:** 87.6 MHz (Hamburg-Moorfleet)

**Language:** German

The NDR 2 is a part of Norddeutscher Rundfunk group, based in Hamburg. It offers the best of pop hits and periodic news briefs.



## KEY MEDIA

### Bayern 3

**Frequency:** 97.3 MHz (München-Ismaning)

**Language:** German

Bayern 3 is a public radio station owned and operated by the Bayerischer Rundfunk (BR). It started operating on 1 April 1971 as BR's third radio channel. It is focused on pop music but also plays rock and urban hits.



### Hit Radio FFH

**Frequency:** 88.1 MHz (Alsfeld)

**Language:** German

Hit Radio FFH is a part the group, Radio/Tele FFH GmbH & Co. Betriebs-KG. Its broadcasting began on November 15 1989, in Frankfurt and is popular for providing adult contemporary music.



### Radio ffn

**Frequency:** 103.1 MHz (Aurich)

**Language:** German

Radio ffn is a commercial radio station operated by Funk & Fernsehen Nordwestdeutschland GmbH & Co. KG in Lower Saxony, Germany. It broadcasts music from the top pop artists and delivers weather and news update between programs.



## KEY MEDIA

### SWR4

**Frequency:** 87.6 MHz (Pforzheim/Wartberg)

**Language:** German

SWR4, a part of Sudwestrundfunk (SWR) group. As a music format, the station mainly plays German-language modern hits. In addition, international evergreens, instrumental and folk music as well as classical music on Sundays can be heard. It is particularly strong in the 50+ target group.

### MDR Jump

**Frequency:** 90.2 MHz (Inselsberg)

**Language:** German

MDR Jump is an entertainment radio program from Mitteldeutscher Rundfunk (MDR). The target group are adults between 20 and 49 years of age. It is the most listened to radio station in the east of Germany. In addition to current charts, songs from the 1980s, 1990s and 2000s are played, as well as informative and journalistic verbal contributions, and regional topics are also given attention.

### Radio BOB!

**Frequency:** 101.4 MHz (Frankfurt)

**Language:** German

Radio Bob is a private Regiocast radio station in Hesse, which has been broadcasting from Kassel since August 5, 2008. The music format is a rock-oriented program aimed at the core target group of people aged 30 and over.



## KEY MEDIA

### SWR1

**Frequency:** 88.4 MHz (Diez)

**Language:** German & English

SWR1 is the first radio program of the Südwestrundfunk. The music selection consists mainly of English-language mainstream pop and rock music from the last 50 years, supplemented by German-language hits and music from other European countries. The content of news covers current affairs, weather, social event information and more. The target group are listeners aged 30 to 59.

### hr3

**Frequency:** 89.7 MHz (Würzburg)

**Language:** German & English

hr3 is the pop music station of the Hessischer Rundfunk group (hr). Most of the music played on hr3 comes from German and international pop music. It has a listener base of 25 to 49 years old offering them informative and entertaining daily programs.

### hr4

**Frequency:** 103.8 MHz (Würzburg)

**Language:** German

hr4 is a radio program of the Hessischer Rundfunk in the format of a service and entertainment wave. It started broadcasting on October 6, 1986. The station mainly offers German-language music. Additionally, the programs include advice and consumer topics as well as current information, weather forecast, traffic, mainly from Hessen. The target group are listeners aged 50 and over.

» SWR1





OUT OF HOME

**AI WEIWEI NEVER SORRY**  
DAS ERSTE PORTRAIT ÜBER EINE DER WICHTIGSTEN PERSÖNLICHKEITEN DES 21. JAHRHUNDERTS

AI WEIWEI ab 22. Juni wieder auf freiem Fuß?  
Ab 14. Juni sicher im Kino!

**Wall**

0709

# GERMANY



## Site

Berlin City West -  
Wittelsbacherstraße 20

## City

Berlin

## Size

264.00 m<sup>2</sup>

## Frequency (Contacts per 28 days)

1,573,455



# GERMANY



## Site

Berlin City Mitte -  
Checkpoint Charlie

## City

Berlin

## Size

310.80 m<sup>2</sup>

## Frequency (Contacts per 28 days)

3.228,710



# GERMANY



## Site

Berlin City Mitte -  
Embassy district

## City

Berlin

## Size

1490 m<sup>2</sup>

## Frequency (Contacts per 28 days)

4,878,258



# GERMANY



## Site

Berlin City West  
-ICC International Congress  
Center

## City

Berlin

## Size

96.77 m<sup>2</sup>/87.04 m<sup>2</sup>

## Frequency (Contacts per 28 days)

5,017,350



# GERMANY



## Site

Berlin City West -  
Kurfürstendamm

## City

Berlin

## Size

224 m<sup>2</sup>

## Frequency (Contacts per 28 days)

2,554,757



# GERMANY



## Site

Berlin City West  
Kurfürstendamm 227 |  
Joachimsthaler Platz

## City

Berlin

## Size

104 m<sup>2</sup>

## Frequency (Contacts per 28 days)

4,937,760

# GERMANY



## Site

Berlin City West  
Potsdamer Platz / Leipziger  
Platz (B1) / Government  
district / vis-à-vis Mall of  
Berlin

## City

Berlin

## Size

551 m<sup>2</sup>

## Frequency (Contacts per 28 days)

2,635,003



# GERMANY



## Site

Berlin City East  
Warschauer Straße |  
Oberbaumbrücke |  
Mediaspree | Ostkreuz |  
Trendy district

## City

Berlin

## Size

288 m<sup>2</sup>

## Frequency (Contacts per 28 days)

3,220,224



# GERMANY



**Site**  
Steglitzer Kreisel

**City**  
Berlin

**Size**  
497 m<sup>2</sup>

**Traffic Figures**  
104,000/day



# GERMANY



## Site

ExpoCube Friedrich-Ebert-Anlage

## City

Frankfurt am Main

## Size

70 m<sup>2</sup>

## Traffic Figures

120,000/day

# GERMANY



## Site

Exprocube Theodor-Heuss-Allee

## City

Frankfurt am Main

## Size

70 m<sup>2</sup>

## Traffic Figures

120,000/day



# GERMANY



Flexiform Digital billboards advertising is a flexible form of outdoor advertising.

The advertising media can be placed in a specific location or move around in specific areas.

# Let's Discuss

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